

Principals: Create and Manage Caseloads

Quick Reference Card

CIITS: Managing Caseloads

Users permissioned with Caseload Manager (included with Leadership) can use the Caseload Manager tool to match teachers with observers for specified observation windows (ex. Peer observations). Leadership users are already set up to observe any teacher at the school automatically but can also be assigned to a caseload if desired.

Create an Observation Caseload

1. Roll your cursor over Educator Development on the navigation bar and click **Caseload Manager**



2. The institution will default to your CIITS default institution. Confirm that the correct institution is selected. If you are permissioned at multiple schools, use the institution drop-down selector to change institutions

All Eligibility Groups
 Filter groups ▼

Teachers by Peer
 Aug, 01 2014 - May, 31 2015
 Group: Teacher
 Choose another window ▼

Create caseloads for: Select Reviewer Type ▼

At Institution: Anderson County High School ▼

3. Select the window that identifies the role of the observer and who will be observed. To select a window click **Choose another window**

All Eligibility Groups
 Filter groups ▼

Teachers by Peer
 Aug, 01 2014 - May, 31 2015
 Group: Teacher
 Choose another window ▼

The following windows are available:

- **Teachers by Principal** – This window should be selected when observing Classroom Teachers
- **Teachers by Peer** – This window will only be used by Peer Observers
- **KTIP Intern by Resource Teacher** – This window will only be used by the Resource Teacher assigned to observe KTIP Interns
- **KTIP Intern by Principal** - This window should be selected when observing Classroom Teachers
- **Instructional Coach by Supervisor** - This window should be used by Supervisors observing Instructional Coaches
- **Instructional Coach by Peer** - This window should be used by Peers observing Instructional Coaches
- **Library Media Specialist by Supervisor** - This window should be used by Supervisors observing Library Media Specialists
- **Library Media Specialist by Peer** - This window should be used by Peers observing Library Media Specialists
- **Therapeutic Specialist by Supervisor** - This window should be used by Supervisors observing Therapeutic Specialists
- **Therapeutic Specialist by Peer** - This window should be used by Peers observing Library Media Specialists
- **School Psychologist by Supervisor** - This window should be used by Supervisors observing School Psychologists
- **School Psychologist by Peer** - This window should be used by Peers observing School Psychologists
- **Guidance Counselor by Supervisor** - This window should be used by Supervisors observing Guidance Counselors
- **Guidance Counselor by Peer** - This window should be used by Peers observing Guidance Counselors

- Use the **Reviewer Type** drop-down to select which user type will be conducting the Site Visit (Principal, Peer)

Create caseloads for Select Reviewer Type

- Click **Add New Reviewer** and type the last name, first name of the person to conduct the observation

Reviewers

Find a Reviewer + Add New Reviewer

- In the menu on the right, select (check) the teacher(s) that you would like to add to this observer's caseload.

Educators

Type to filter		
<input type="checkbox"/> Name	Observers	ID #
<input checked="" type="checkbox"/> ADKINS, MARY	0	
<input type="checkbox"/> ATHA, EDITH	0	
<input checked="" type="checkbox"/> BARKS, AMY	2	
<input type="checkbox"/> BARNES, ASHLEY	0	
<input type="checkbox"/> BUCKMAN, STEPHANIE	1	
<input checked="" type="checkbox"/> COSLOW, ASHLEY	0	
<input type="checkbox"/> CURRY, KAITLYN	0	

- Once you have selected/checked all of the educators for this reviewer, click **Add Selected** to add them to the caseload

Principal, a 0
Add Selected

Removing Teachers from a Caseload

- Expand the reviewer screen to display the Observers full caseload

Reviewers Add Reviewer

Type to filter

EVANS, JONES 23
Add Selected

ABERNATHY, MATTHEW 4
Add Selected

- Click the delete icon (trashcan) next to the name you would like to remove from the caseload

Anderson, Teacher 1
Add Selected

Peer Observer

Trashcan icon **Derek Jones** Anderson County High S...